

Figure 1

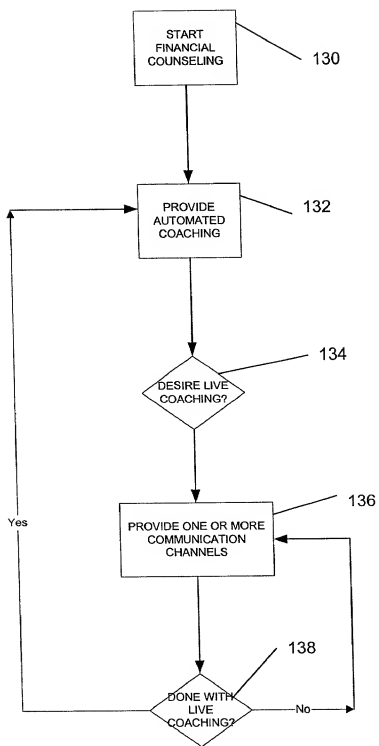


Figure 3

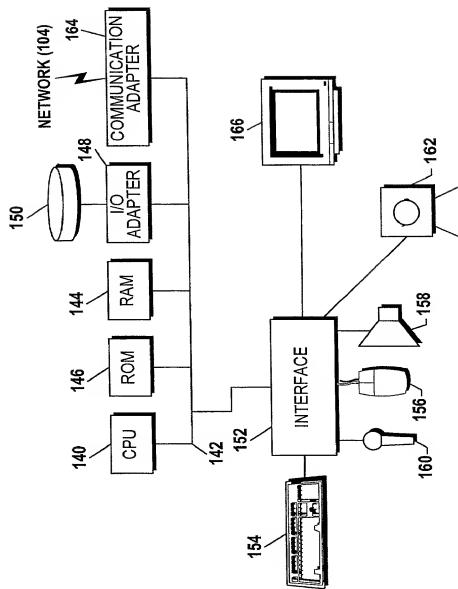


Figure 4

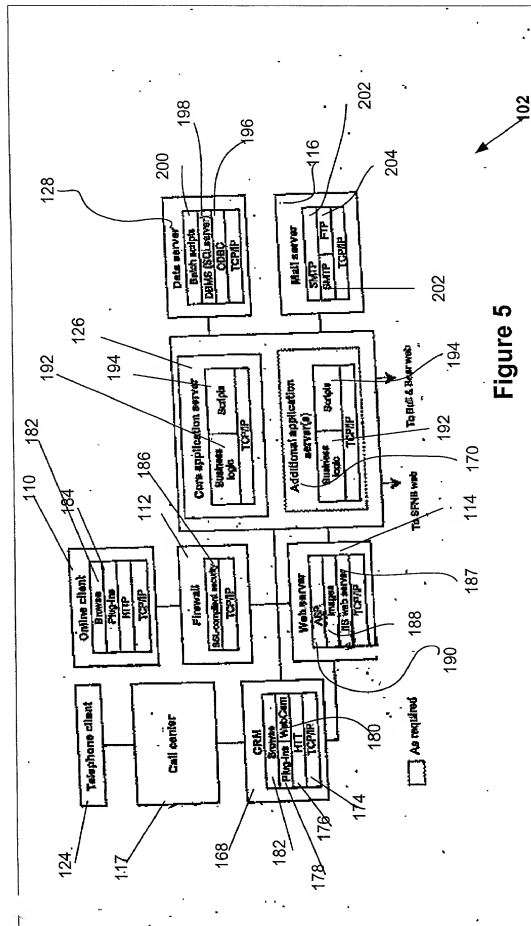


Figure 5

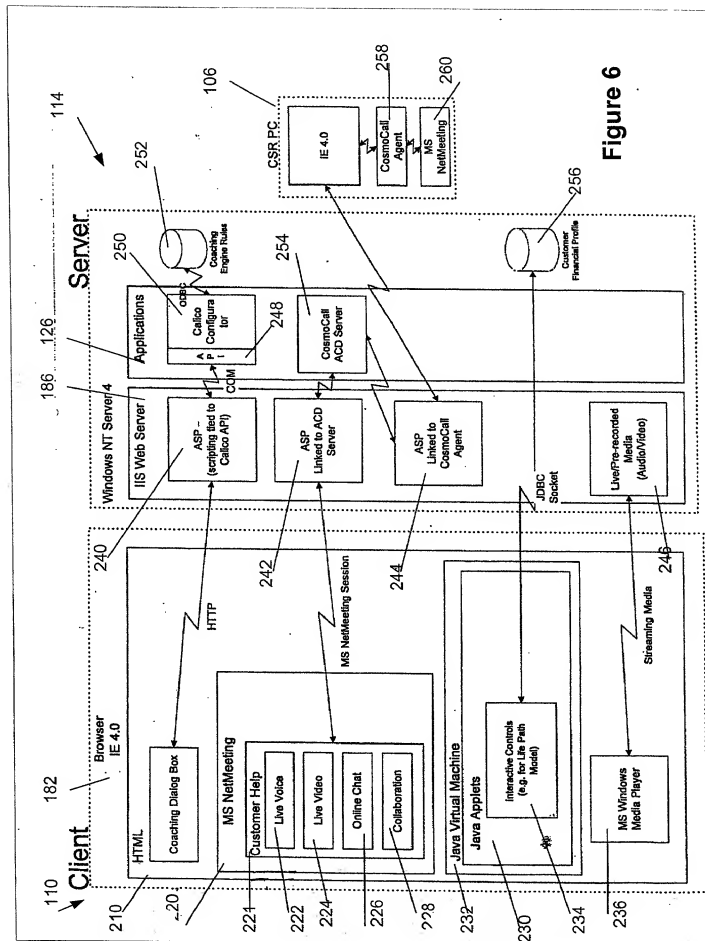
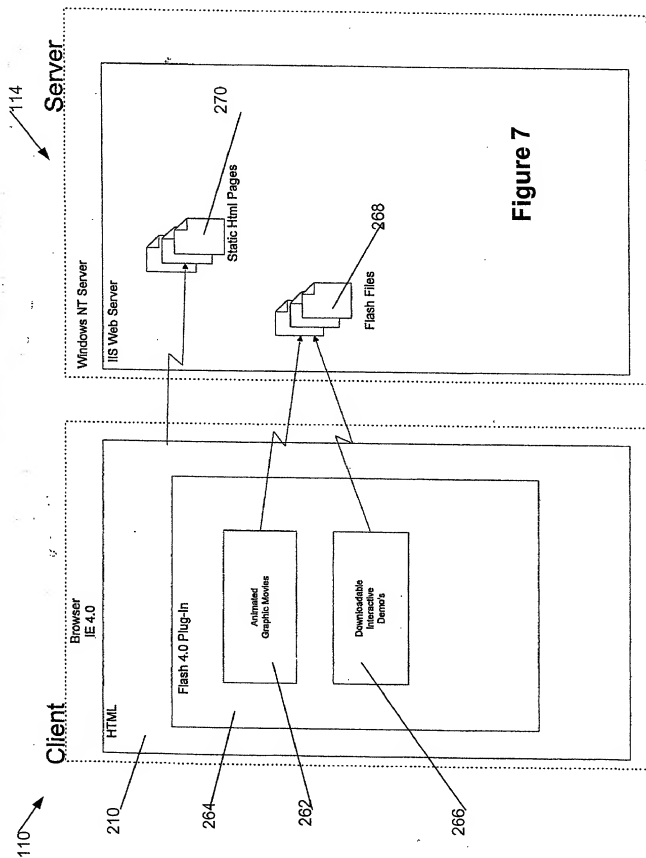


Figure 6



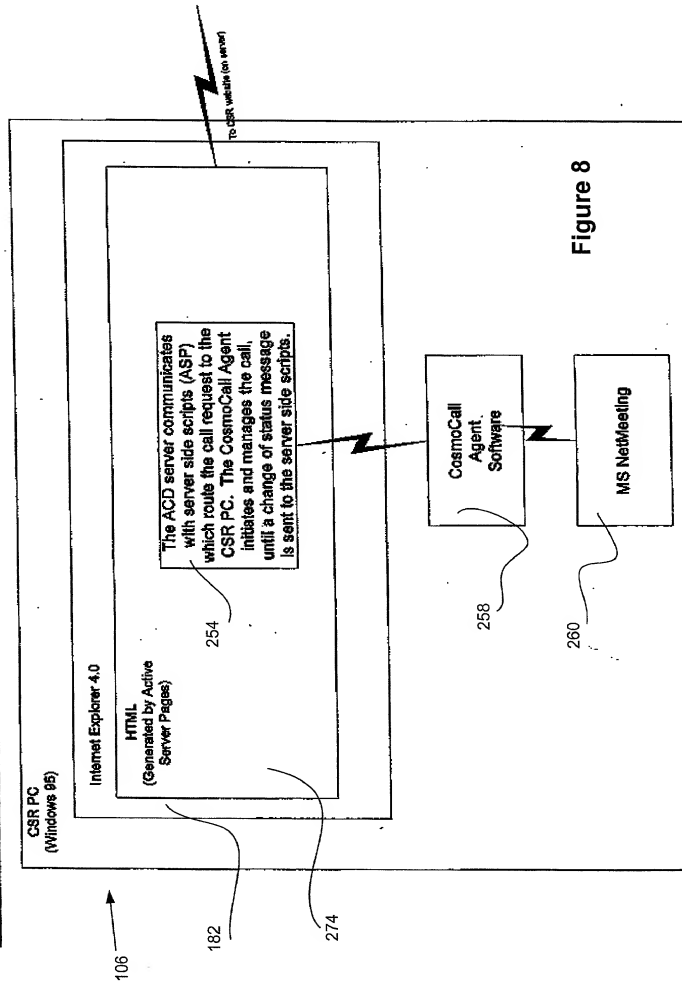


Figure 8

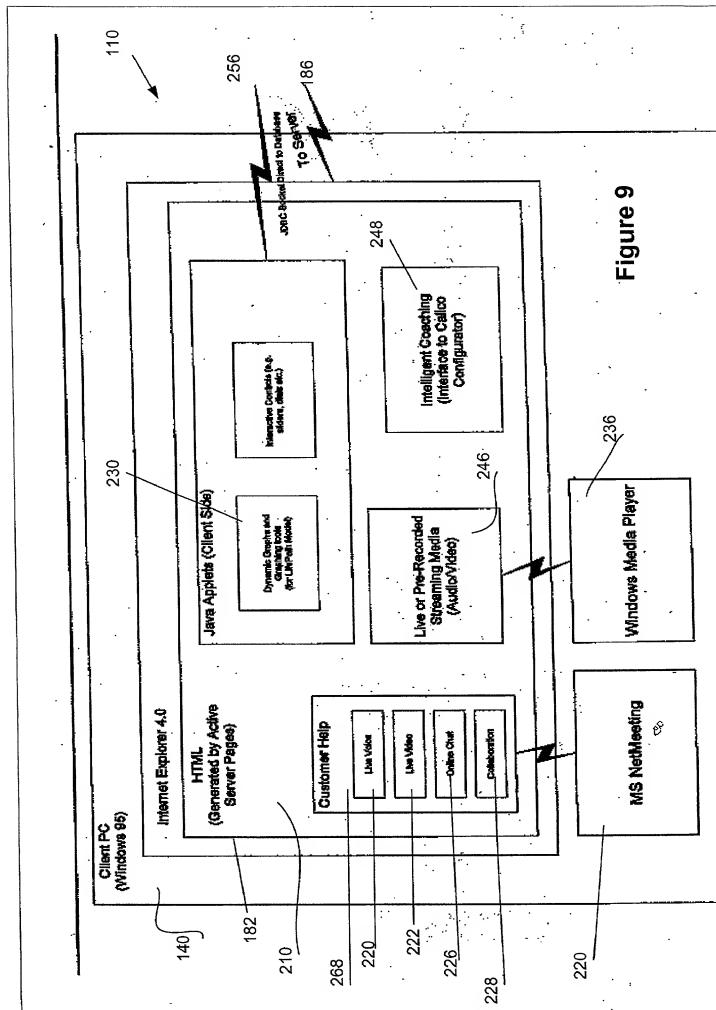


Figure 9

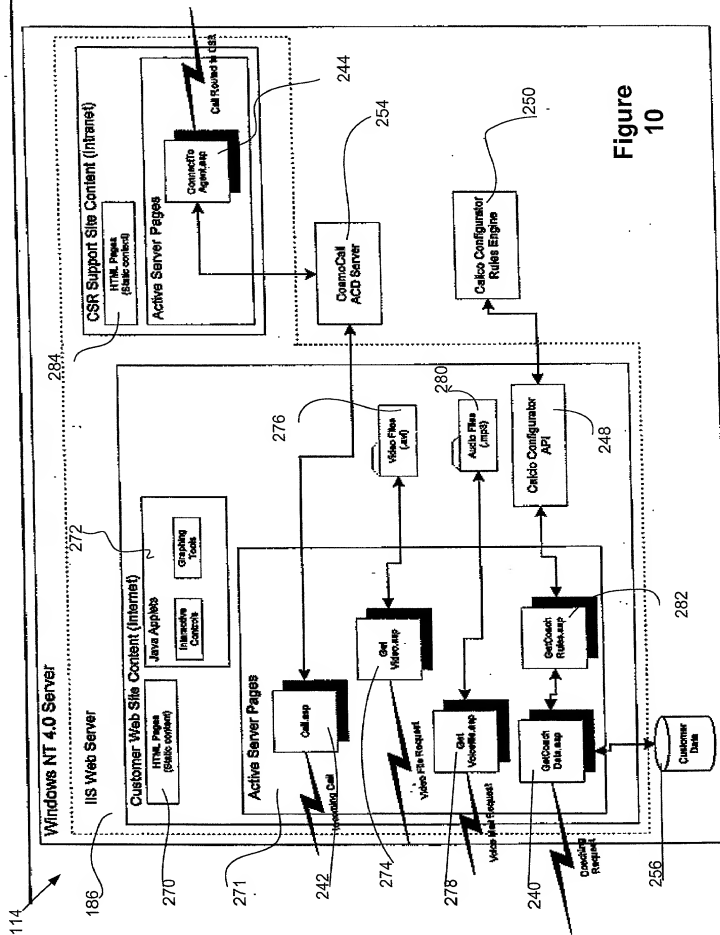


Figure 10

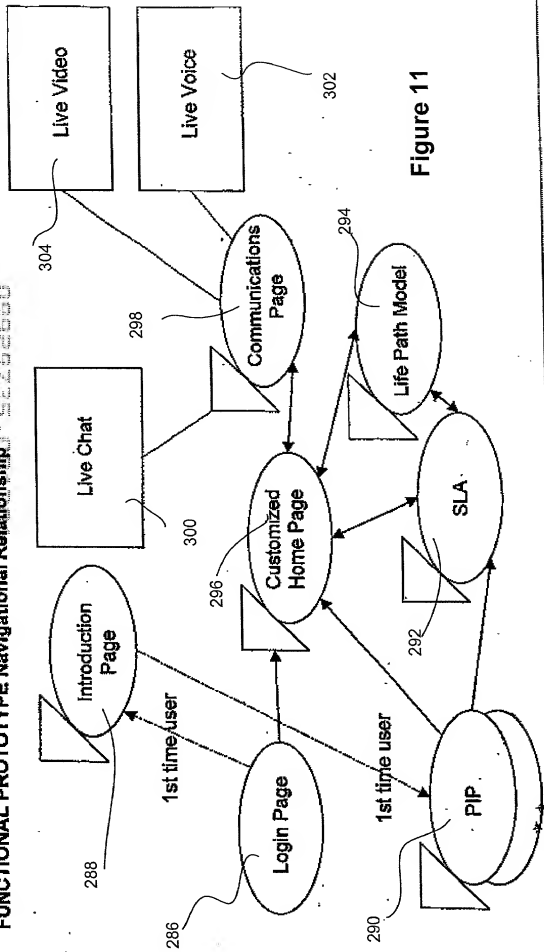


Figure 11

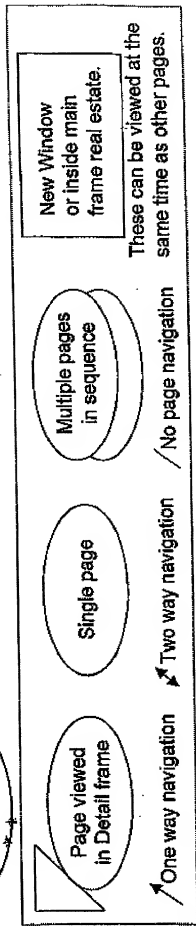
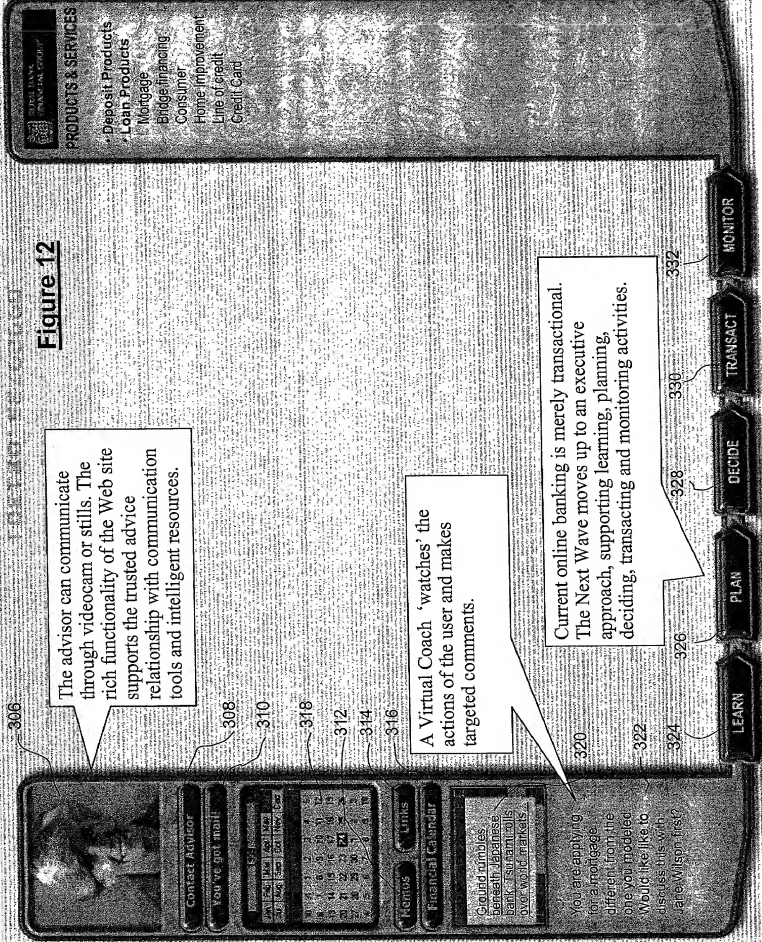


Figure 12



PLAN LIFE PATH MODEL

Both your home purchase and your children's education are pushing you into the red. Revisit your home purchase plans and consider a tax deferred education savings plan.

Contact Adviser

You've got mail!

Remember to Revisit

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

MAX PERCENTAGE

Groundrules:
Beneath Japanese
bank, Tsunami rolls
over world markets.

You are applying
for a mortgage
different from the
one you modeled.
Would you like to
discuss this with
Jane Wilson first?

History

Financial Calendar

Notes

Links

PERSONAL RISK MODEL

Include any combination of factors in your risk model.

☐ JOB LOSS 338

☐ DISABILITY 334

☐ CASUALTY

☐ MARKET DOWNTURN

☐ DIVORCE

☐ THEFT

☐ FIRE 340

☐ COLLISION

☐ RUN THE MODEL

322

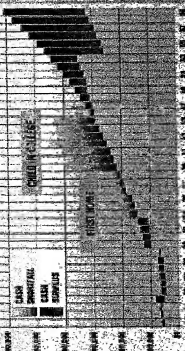
LEARN

PLAN

DECIDE

TRANSACTION

MONITOR



336

EXPENSES

Press each button in turn to do a Life Path for all sources of revenue and expense...

☐ HOUSING

☐ TRANSPORTATION

☐ FOOD

☐ CLOTHING

☐ UTILITIES

☐ EDUCATION

☐ HEALTH

☐ ENTERTAINMENT

☐ TAXES

☐ SAVINGS

☐ INVESTMENT

☐ RETIREMENT

☐ OTHER

Figure 13

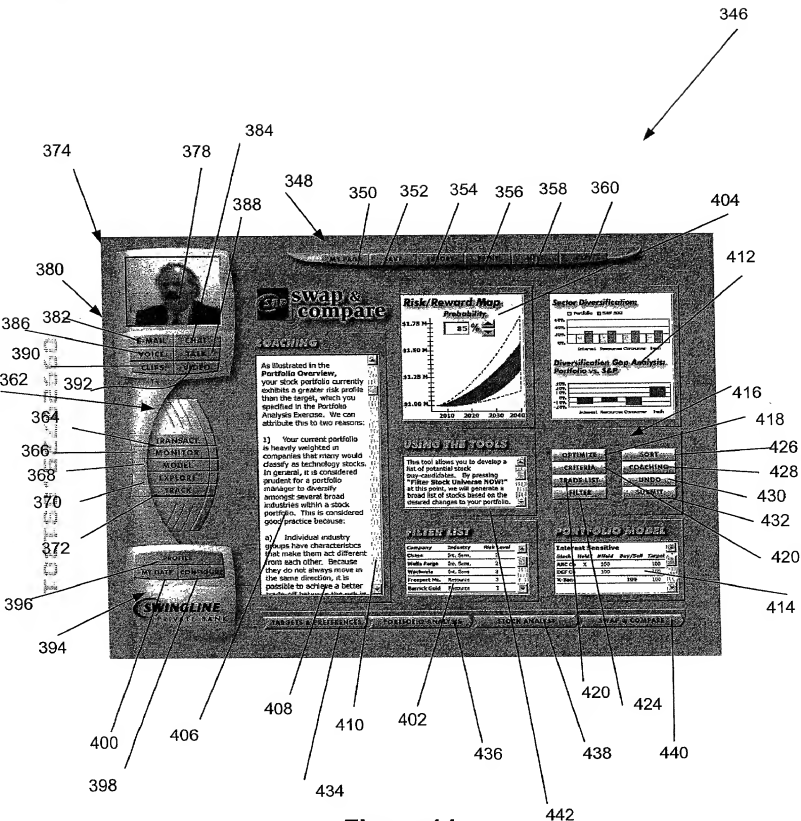


Figure 14